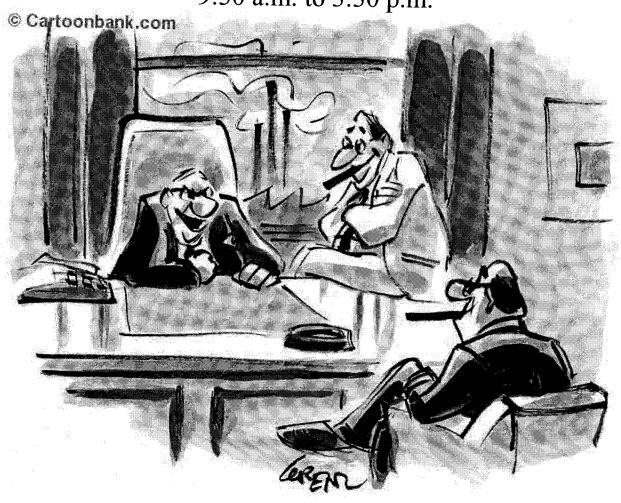
## AGENDA TEXCOM MEETING

Trusts and Estates Section State Bar of California

March 17, 2007 Downey Brand Sacramento 9:30 a.m. to 3:30 p.m.



"Well, we've licked taxes—that just leaves death."

## WELCOME, INTRODUCTIONS AND REPORTS OF CHAIR/VICE CHAIR (30 minutes)

II

A	Welcome	[HARTOG]
B.	Approval of Minutes of January Meeting	[HARTOG]
C.	Report of Chair (15 min) Travel Reimbursement	[HARTOG]
	Nominating Committee (10 min)	(Potts)
D.	Report of Vice Chair (5 min) Finance and Budget – Financial Report	[STERN]
COMMITTEE, TASK FORCE AND LIAISON REPORTS		
, A.	ESTATE PLANNING (50 min) 1. Compassionate Choices Act 2. Revocable TOD Deeds	[MACDONALD]
B.	CLRC (55 min) 1. No Contest Clause Study 2. Care Custodian Task Force 3. TOD Deeds	[HORTON] [Kovar] [Horton] [Ito/MacDonald]
C.	<ol> <li>TRUST &amp; ESTATE ADMINISTRATION (20 min)</li> <li>Increased Limits on 13100 proceedings SB 553</li> <li>Creditors' Claim harmonization AB341 (Hartog)</li> <li>Incapacitated Dentists SB 387</li> </ol>	[BURGER]
D.	LEGISLATION (30 min)  1 Timeline for TEExComm legislative proposals 2 Mandatory procedures re legislative proposals	[REGGIARDO]

3. Online Bill Tracking legislative information: www.leginfo.ca.gov/

## **IMPORTANT GUIDELINES:**

- Please use approved format for legislative proposals.
- Please use approved comment form for legislation comments.
- Always write to Larry Doyle, not directly to a member of legislature or legislative staff.
- Confirm testimony needs with Legislation Chair.
- If you agree to testify, be there unless otherwise notified

## LUNCH (45 min)

E. INCAPACITY (60 min) [TONG/COREY] Lowrie Bill SB 183 1. Investment Standards Probate Code § 2590 (Stern/Green) 2. 3. Annuity Suitability Standards SB573/AB 267 (Corey) 4. (Corey) SB 611 5. Other New Legislation (Tong/Corey/Reggiardo) **Educating Seniors** (Kosloff) 6. 7. Coordination with Office of Emergency Services (Pollard) 8. Medi-Cal Updates (Stern) F. TECHNOLOGY (5 minutes) [GAW] 1.E-Newsletter 2.Website 3.Protocols

G. LITIGATION (10 min) [KOVAR]

- 1. Mediation Project (Henden)
- 2. New Cases

(Zabronsky)

H. MEMBERSHIP & MARKETING (5 min.) [KOSLOFF]

I. INCOME AND TRANSFER TAXES (5 min) [HAYES]

K.

CEB (5 min)

J.

[GOOD]

EDUCATION (10 min) 1. State Bar Annual Meeting Programs [ALBERIO]

2. Stand Alone programs

**Advanced Topics** 

Botched Trusts

- 3. 2007/2008 Winter SEI
- 4. Your Legal Rights
- L. QUARTERLY (5 min)

[HAND]

- 1. Manuscripts
- 2. Electronic Dissemination
- M. ETHICS (10 min)
  Timeline for Publication of Ethics Guide

[LODISE]

N. NCCUSL (5 min)

[GODSHALL]

O. CONFERENCE OF DELEGATES (5 min)

[HENDEN]

- P. NEW BUSINESS
- Q. COMING ATTRACTIONS

NEXT TEXCOM MEETING ANNUAL RETREAT April 27-29, 2007 Hyatt Incline Village